

MODEL FOR STUDYING THE VALUE CHAIN OF THE ANIMATION SECTOR



European Union
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Development Fund

A study by



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ALICE

What is ALICE?

ALICE (Animation League for Increased Cooperation in Europe) is an interterritorial European cooperation project dedicated to the **animation sector**.

The six partners of ALICE **WALLIMAGE** —Wallonia (BE)—, **PICTANOVO** —Hauts-de-France (FR)—, **PROA** —Catalonia (SP)—, **PUGLIA REGION** —Puglia Region (IT)—, **MINISTRY OF CULTURE OF THE SLOVAK REPUBLIC** —Bratislava (SK)— and **RZESZOW TERRITORIAL DEVELOPMENT AGENCY (RARR)** —Rzeszow (POL)— identify, analyse and share the difficulties and barriers found in the animation sector, and involve experts, representatives of the sector and authorities in the dialogue with the aim of being able to present a wealth of solutions and improvements based on exchanging experiences, the identification of good practices, and ultimately, on interterritorial cooperation.

- **ALICE raises awareness for animation in Europe.**
- **ALICE unites the agents from the animation sector within the territories.**
- **ALICE is set up as a space for dialogue, exchanging experiences, and the generation of innovative solutions for the animation sector.**

The objectives of ALICE

- Encourage the **growth** of European SMEs that are dedicated to animation, and have an impact on the improvement of policies associated with this sector.
 - Facilitate **co-productions**.
 - Boost access to **funding**.
 - Increase its **competitiveness** on the international market.
- Improve **training** and **retain talent** in the animation sector in Europe.

The duration of ALICE

- **Phase I: from 1 August 2019 to 31 July 2021**

Throughout this phase, develop an action plan, based on exchanging experiences, conducting studies, and dialogue between ALICE partners in order to obtain a series of proposals which aim to find a solution to the issues found.

- **Phase II: from 1 August 2021 to 31 July 2022**

The action plan will be implemented in this phase: a report will be drawn up stating the success (or failure) of moving from theory to practice for the proposals developed in Phase I.

The partners of ALICE



WALLIMAGE

Leading Partner

Mons, Territory of Wallonia, Belgium.

This company, belonging 100% to the Walloon Government, was created in 2001 in order to promote the development and sustainability of the territorial audio-visual industry. Wallimage is the Walloon Investment Fund for funding the audio-visual industry via selective funds and coproduction funds.

Funding areas include fiction, documentaries, animation and new formats, both for the TV and for cinema; in addition, it has a new source of funding for audio-visual companies. Wallimage also acts as an analysis and advisory company, and participates economically in productions that would be a significant expense in the territory; it is also the body that announces about tax incentives and which coordinates any filming in the territory.

www.wallimage.be



PICTANOVO

Partner 2

Lille, Hauts-de-France, France.

Public entity that manages, in association with the CNC (Centre national du cinéma et de l'image animée [French National Centre for Cinema and the Moving Image]), eight audio-visual funds (for writing, development and production).

It funds projects for cinema and television —documentaries, animation and fiction— but also videogames and new formats. It also acts as film commission, with extensive databases for professionals, as well as companies or localisations, and offers continuous advisory and training sessions.

www.pictanovo.com



PROA

Partner 3

Barcelona, Catalonia, Spain.

The only private entity in the ALICE project, PROA is the Spanish Federation of Audio-visual Producers, based in Barcelona.

Founded in 2008, it currently has 7 federated associations and more than 200 members in total, including companies producing entertainment programmes, documentaries, fiction, animation, and videogames.

The Federation acts as a strategic agent in defence of the interests of the audio-visual sector both at a national and international level. It is working on the development of a sustainable audio-visual ecosystem which will improve the conditions of its partners, and is generating spaces for accessible information and training.

ProAnimats, the Professional Association of Animation Producers, with approximately twenty associated production companies, is federated with PROA and actively participates in other organisations such as DIBOOS (the Spanish Federation of Animation) and ANIMATION in EUROPE, the European Federation of Associations for Independent Animation Producers, which brings together twenty-two organisations from fifteen European countries.

www.proafed.com



PUGLIA REGION

Partner 4

Bari, Puglia Region, Italy.

The Territorial Government of Puglia (Dipartimento Turismo, Economia della Cultura e Valorizzazione del Territorio della Regione Puglia) via the Puglia Film Commission Foundation, acts as economic support at all stages of audio-visual projects (cinematographic feature films, short films, series and televised formats and documentaries), from looking for co-producers — via the Apulia Film Forum— and in production —via the Apulia Film Fund and its cash rebate— and the subsequent promotion of the projects.

www.apuliafilmcommission.it



MINISTRY OF CULTURE OF THE SLOVAK REPUBLIC

Partner 5

Bratislava, Slovak Republic.

The Ministry of Culture of the Slovak Republic has conducted intense activity on designing a strategy for the development of the Cultural Industries, via the Slovak Audio-visual Funds (which have a specific support programme for animation) or the creation of the Slovak Arts Council, an entity which supports the videogames sector and which the Ministry manages firstly via the Culture and Creativity development Department and secondly via the Media, Audio-visual and Copyright Department.

In addition, the Slovak public television (RTVS) has committed to heavy investment as co-producers in children's animation content.

With all of these measures, the Slovak animation industry has gone from strength to strength and is now facing new challenges: the development of co-productions with Western Europe, finding new distribution models for animated content, and developing ways to incentivise public and private investment in the animation industry.

www.culture.gov.sk



RZESZOW TERRITORIAL DEVELOPMENT AGENCY (RARR)

Partner 6

Rzeszow, Poland.

The objective of the RARR, is to support the development of the Voivodato (province) of Podkarpackie. It is currently one of the most important players in the social and economic scene in the territory, focusing its operations within the framework of national and European cooperation networks.

For this territory, which enjoys two public audio-visual funding sources (the national source, via the Polish Film Fund—which also manages the 30% cash rebate for Polish productions, co-productions and services— and the territorial source, via the Podkarpackie Film Commission), the priority is to incentivise competition between the SMEs in the territory; supporting the creation of animation studios, promoting the creation of audio-visual clusters, and encouraging training and development programmes for territorial talent.

www.rarr.rzeszow.pl

How ALICE operates

Interterritorial dialogue is structured by means of four **working groups (WG)**, which are directed or co-directed by one or several partners in the project:

- **FINANCIAL & LEGAL (F&L WG).** Co-directed by Pictanovo and Wallimage. Its objective is to study the legal and regulatory framework for European co-productions so as to propose the creation of new public funding systems or the adaptation of those that already exist. This is in order to facilitate the collaboration and access to funding for SMEs, within the framework of international co-productions.
- **ENTREPRENEURSHIP & TRAINING (E&T WG).** Directed by the Puglia Region. Its objective is to create support plans for innovative and inclusive entrepreneurship via public and private cooperation. This includes innovative training plans which could be implemented in the partners' territories.
- **PROMOTION & AUDIENCES WG (P&A WG).** Co-directed by the Ministry of Culture of the Slovak Republic and PROA. This working group analyses the latest methods used to distribute and promote content and identifies areas of improvement.

- **CLUSTER / SMART SPECIALISATION WG (C/SS WG).** Directed by the Rzeszow Territorial Development Agency. This WG studies how cluster and “intelligent specialisation” strategies address the digital animation value chain.

In addition to the meetings and conclusions of the various working groups, via PROA, with the support of the Ministry of Culture of the Slovak Republic, the creation of a **MODEL FOR STUDYING THE VALUE CHAIN OF THE ANIMATION SECTOR** was suggested, which facilitates the **creation of a common methodology** for studying the sector and **harmonises** the core indicators and variables that need to be considered in order to:

- **Obtain a snapshot of the entire sector in any territory.**
- **Enable the data to be comparable.**
- **Facilitate the identification of links in the animation value chain which need to be strengthened in each territory.**
- **Help plan the growth of the animation sector’s ecosystem with an organisational and sustainable strategy.**

MODEL FOR STUDYING THE VALUE CHAIN OF THE ANIMATION SECTOR

Motivation for conducting this study

The animation industry is a resilient, committed and international sector that generates high qualified jobs, stable employment and youth occupation. It welcomes diversity and can lead the digital vanguard. It is also a delocalised and flexible industry that can also generate additional activities based on IP, an intangible asset of a territory, in the form of cross-media products and licences.

Children's animation is also a form of educational entertainment, a builder of references that help to define the vision of the world during childhood.

The animation industry is a sector that is much more relevant and strategic than what it has been considered in the past, currently positioning as the audio-visual sector with a better growth forecast. The animation industry could give a territory enormous economic, employment, cultural, educational and technological assets.

In September 2017, Creative Europe Media presented its ANIMATION PLAN FOR EUROPE, basing its recommendations and proposals on the one hand, on the dialogue held between the European Commission with the different agents in the sector, and on the other hand, on the information found in the most comprehensive and up-to-date report that European animation has to date, the publication by the European Audio-visual Observatory in 2015, "Mapping the animation industry in Europe".

The ANIMATION PLAN FOR EUROPE highlighted the **animation sector's potential for growth**—flexible and pioneering in the adoption of innovative, technological and artistic solutions, and in the trial of new business models—, and the **universality of the audio-visual animation projects**—which are able to find audiences in many other countries other than the one where production took place and can stir the interest of various age groups—.

However, the document also focused its attention on some of its weaker points, such as its **much longer production cycle**: animation, compared to a real-image project, requires more time and more money to be carried out and therefore, the return on investment, can take up to ten years—including the project's development period—in the case of cinematographic feature films. Access to sufficient funding for companies and the audio-visual projects in the short-, medium-, and long-term is therefore, a key challenge for the sector.

Another aspect addressed is the historical **dependency of the animation sector, concerning its funding, on traditional linear television channels** (public and private), which are now facing:

- The growing competition from new agents (VOD and video sharing platforms).
- An enormous pressure on their budgets.

They need, on the one hand, **to urgently adapt to new digital models of audio-visual consumption** and, on the other hand, to **harmonize the obligations** of all media services providers (linear and non-linear) targeting European audiences, both in the aforementioned mandatory financial **invest** in European projects, and in **quotes for European content** in their programme schedules and catalogues.

For their part, creators of audio-visual animation content also had to adapt to these **changes in user consumption patterns**—which modify tendencies in **formats** and **monetisation** of content—as well as to the business models proposed by OTTs, which, for independent producers, generally imply **greater difficulty with regard to retaining the IP**.

The **challenges** faced by the European animation sector listed in the ANIMATION PLAN were:

- **Retaining talent**, creating a framework that promotes the growth of the companies in the sector and the synchronization between training offer and Industry needs (bearing in mind the necessary permanent training update of both professionals and teachers).

- **The conservation of intellectual property (IP)**, an intangible asset that the ANIMATION PLAN places value on, and which requires, to become a valuable tool for the exploitation and monetization of the works, increased investment in promotion and marketing, and greater focus on distribution strategies.
- **The creation and promotion of the “European Animation” brand**, building its identity and image and making it a competitor at a global level.
- **The sector’s access to funding**, improving the already-existing private and public sources of funding, and implementing new ones that align with the transformation of the business models for audio-visual consumption, allowing finance for companies in:
 - The short term: liquid assets.
 - The medium-term: guarantees and access to credit.
 - The long-term: the conservation of the IP.

That will enable the stable growth of the sector.

With a view to the future, the **priorities** listed in the ANIMATION PLAN made reference to talent, promotion and audiences, and access to funding.

- **Training and talent:** set out the objective of making Europe an attractive place to work for both European and foreign talent.
 - Promoting connections between training and industry.
 - Facilitating the mobility of talent.
 - Emphasising the importance of updating training.
- **Promotion and audiences:** set the objective of increasing the global competitiveness of European animation via promotion, marketing, and dubbing.
 - Improving investment and the promotion and marketing strategies.
 - Increasing investment in subtitling and dubbing.
 - Incentivising and facilitating co-productions.

- **Funding:** with the aim of facilitating access to funding to promote growth in the sector.
 - Developing new financial instruments.
 - Combining public and private funding.
 - Reinforcing the dialogue between the financial sector and the animation industry.

With this plan, the Commission concluded with the desire that, in five years, European animation would **consolidate its identity and would be recognised as a seal of quality** both for cinematographic productions and non-cinematographic productions.

However, this vision of “European animation” as a single unit clashed with the **heterogeneous figures** raised in the aforementioned publication by the European Audio-visual Observatory in 2015 “Mapping the animation industry in Europe” from the animation sector in each one of the different territories studied, not only in terms of the number of projects produced and their average budget, but also with regard to the number of cinematographic screens, digital televisions or channels aimed at a children’s audience.

In addition, the general snapshot offered by animation produced in Europe in the period between 2010 and 2014, in terms of global competitiveness, referring to the production volume and audience, had worrying data:

- *14.7% of European cinema tickets are for animated films.*
- *European animation accounts for only 20% of the animation market in Europe.*
- *An average of 50 European animated films is produced per year.*
- *Of the 188 new animated films released in the European Union in 2014, 107 were produced in the EU. However, the 44 American films released accounted for the majority of the animation box office that year.*
- *Of a total of 301 (plus another 40 simultaneous high-definition broadcasts), 217 children's channels are established in the European Union by US affiliates.*
- *Regarding the volume of television production, France ranks as the first European country, with the highest number of hours of television animation produced with a total of 285 hours in 2015.*

- *The proportion of European works broadcast by European children's channels seems to be linked to the dynamics of each national animation industry. Children's channels in the United Kingdom or France account for a high share of national animation.*
- *The proportion of European animation also varies strongly between European VOD platforms. The United States (and sometimes Japan) is generally the top source for programming.*

On the one hand, European Animation seemed to be a concept that was generated more due to opposition to American or Japanese animation than due to being a driving force per se and, on the other hand, it was easy to jump to the conclusion that European animation needed to have a more favourable development framework throughout its entire value chain and in order to achieve this, it was imperative to understand all stages involved in the creation process.

In addition to the ANIMATION PLAN FOR EUROPE, other initiatives that need to be kept in mind were rolled out:

In 2016, 14 organisations from 12 European countries founded ANIMATION in EUROPE, the European Federation of Animation Producers' Associations which aimed to:

- Achieve investment in the production of original content in Europe from any media service provider for European audiences.
- Ensure the means for public funding at a European, national and/or local level for the production of audio-visual animation projects produced in Europe.
- Maintain a regular and constructive conversation with the European authorities regarding the regulation and funding of the animation industry.

And an unwritten objective: build an effective dialogue network between animation producers, an exchange of knowledge, of successful practices, of challenges, which each one of the organisations that have regularly shared experiences from the time the Animation in Europe was founded, have been able to implement, which has hugely enriched their knowledge about the heterogeneity of European Animation.

On the part of the European Commission, and following lengthy debates, the approval of the new Audio-visual Media Services Directive in 2018 marked a pathway for the review and update of the consumption models and management of audio-visual industry and obliges Member Countries to reflect on the regulatory framework of its industries and, in the most advanced ones, to prepare the regulatory environment for a digital reality that to a great extent, can still only be imagined.

From what we understood, the future would be marked by cooperation between countries, exchanging experiences and identifying good practices which could be replicated in other territories, and above all, by the thorough understand of the different stages that affect the value chain in the animation sector.

When the ALICE project started to take shape, we realized the difficulty to talk about “European Animation” between us: in each territory that formed part of the project, animation the sector had specific characteristics and was in very different stages of maturity.

In addition, we found there to be an enormous lack of information on aspects beyond the number of produced works and their results in the box office. We noted how little we knew about each other: whilst animation is, by definition, an internationalized sector, we found a lack of knowledge exchange between territories which prevented us from finding formulas that, *de facto*, would promote sustainable growth of the European Animation ecosystem as an **organic unit**.

What if —we wondered— we could design a model that would enable us to study the same variables and indicators for each territory to:

- Thoroughly understand the animation sector in each territory and what stage it was in, in terms of maturity.
- Be able to really compare the animation sector in the different territories by studying the same elements.
- Identify the weakest areas in each one of them that needed strategic incentives.
- Promote the interterritorial adoption and adaptation of measures that have been successful in other territories.

And what if, the design of this ‘Model for studying the value chain in animation’ that we would develop during PHASE I of ALICE, could be the start of a bigger and more ambitious project?

The draft action plan for the animation ecosystem in Europe

Our proposal is for this *Model for studying the value chain of the animation sector* to be the start of a more comprehensive action plan for the entire European animation ecosystem, and would be structured in six phases:

PHASE I. MODEL FOR STUDYING THE VALUE CHAIN OF THE ANIMATION SECTOR

I.I. DEFINITIONS

I.II THE VALUE CHAIN OF THE ANIMATION SECTOR

Definition

Objectives

Approach

Main variables and indicators

PHASE II. INVESTIGATION AND COLLECTION OF DATA

Design of quantitative and qualitative surveys

Collection of data

Organisation of the data

PHASE III. ANALYSIS

Processing of the data

Interpretation of the data

Assessment

PHASE IV. BENCHMARKING¹

Comparison between the sectors in the different territories

Designing an efficiency plan

In each territory

At a European level

PHASE V. IMPLEMENTATION OF THE EFFICIENCY PLAN

PHASE VI. CONTROL

¹ Tool designed to achieve efficient behaviour in the markers or sectors (animation), which consists of comparing the yield of the companies (or territories), via the metrics defined by variables, indicators and coefficients.

Methodology used to conduct this study

At the beginning of the **ALICE Project**, both **PROA** and the **Ministry of Culture of the Slovak Republic** had expressed their desire to carry out a comprehensive study of the animation sector within its territories, as both entities were aware that actions aimed at improvement could not be implemented if they neither knew the sector's stage of maturity nor need that should be met, in the short-, medium-, and long-term was needed.

It was agreed that PROA would lead the proposal, since the partners were confident in its knowledge of the subject and its direct mediation with many of the agents involved in the value chain.

The first discussions brought one of the core issues to light immediately: it was necessary to establish some **clear and common definitions** in order to understand what was going to be studied and how it should be structured.

From November 2019 until June 2020, the working group held **four meetings** to establish the general structure of the project and a total of **eleven proposals** were discussed as to what the document should be like. The project was divided into two types of **activities, the main activities and the support activities**, as well as the stages that should be included in each one of these two groups; the order was set so that the result would be consistent.

In addition, the meetings defined how **to organise the information**, highlighting, at the start of each stage, **which elements would need to be considered** and their **specific definitions**, with the aim, via these elements, to steer the direction of each category.

In this stage, **information was exchanged with other agents** who were interested in developing, or had developed, similar proposals, such as with ACCIÓ (Agència per la competitivitat de l'empresa de la Generalitat de Catalunya [Agency for Business Competitiveness of the Territorial Government of Catalonia]) or with CEE Forum, and reference documentation was shared which could be useful when it came to formalising our proposal.

In June, the group had got an initial structure together; however, it needed an external perspective that would also provide guidance on the work that was being carried out in other ALICE's work groups, because it was understood that this exchange could enrich the structure, provide content and offer some initial clues on the breakdown of the main variables and indicators to be considered, which ultimately was the most important factor, since the theory developed in this study would be put into practice on them. We had to move onto the **“Cross-sectional stage”**.

At the end of June, the working group met with the **ALICE's project managers**, presenting them the document that had been made to date, outlining the point at which it was at and how it needed cross-sectional exchanges with the rest of the ALICE partners: it was important that the study received vital inputs from the thoughts of other working groups.

In June, the ALICE's project managers sent their contributions, and before the end of the second quarter, PROA, which had already developed the latest versions of the document alone, was able to send a **new version**.

With the contributions added by the **ALICE's project managers** in October, PROA also presented a first draft to all the partners ending October, in which it had already laid the foundations in terms of content, but had not structured the breakdown of variables and indicators.

In November, the partners from the **Puglia Region**, within their working group “Entrepreneurship and training”, presented a series of **surveys for educational centres, institutions and production companies**, which were very useful in terms of setting certain **variables and indicators** with regard to the training stage. Holding the debate **“The theatrical distribution of European animation films”** organized by PROA, in December 2020, in the “Promotion and Audiences” working group enabled many aspects related to distribution to be understood, and highlighted the objective of the stage in which this link in the value chain of animation is found.

In December, PROA presented its second draft to the ALICE's project managers and to the Ministry of Culture of the Slovak Republic including now **thorough content on each stage and an exhaustive breakdown of the variables and indicators**.

In May 2021, PROA finalised the study and moved onto getting it translated in order to share it with the ALICE partners.

From a **content** perspective, when setting the main activities and support activities, as well as the stages and listing the relevant variables and indicators in each one of them, documents such as the ones mentioned above, the ANIMATION PLAN FOR EUROPE, and the one developed by the European Audio-visual Observatory “Mapping the animation Industry” were taken into account, as were other studies on the funding systems for the audio-visual industry such as the one conducted by PROA in 2017 “*Los modelos de financiación pública del audiovisual en Europa* [Models of Public Funding for the Audio-visual Industry in Europe]”, which the Federation has kept updating as and when the Audio-visual Media Services Directive has been implemented in the national regulations in the various Member States.

We kept in mind, the European regulatory framework and that of the various territories, reports from entities such as MEDIA, CARTOON, Erich Pommer Institute, and the guidelines developed by the Cinematography institutes, Film Commissions, and other promotion agents in the audio-visual sector, as well as articles by universities, law firms and other specialised publications. The documentation used as reference material can be found at the end of this study.

However, above all, we discussed with producers, distributors, sales agents, exhibitors, lawyers, training centres, public institutions for the promotion of the audio-visual industry, public broadcasters, and VOD platforms, both with Europeans and those based in Europe, and we attended conferences, courses, seminars and master classes.

All of these exchanges with the various agents from the sector, which cannot be reflected in the documentation was probably the most valuable element we had to make this study consistent and give it meaning; whose primary objective at all times has been to become a useful tool to improve the animation sector in Europe.

We hope that this **Model for studying the value chain of the animation sector** can be implemented in the territories of the ALICE partners and, perhaps, can be extended to a greater number of European territories who would like to join the challenge of **discovering a chance for a future in the animation industry.**

STRUCTURE OF THE MODEL FOR STUDYING THE VALUE CHAIN OF THE ANIMATION SECTOR

I.I DEFINITIONS

- **MAIN ACTIVITIES**
To integrate the stages related to the **generation** of audio-visual animation products and their **launch onto the market**.
- **SUPPORT ACTIVITIES**
These include the stages which create the **necessary conditions** to make the European animation sector grow as a whole.
- **STAGE**
Each one of the phases that make up the complete process that encompasses the animation industry.
- **KEY FIGURES**
Subjects (individuals or legal entities) involved in each stage.
Perform the ACTIONS that are carried out in each stage.
- **ACTIONS**
Initiatives that the KEY FIGURES carry out in each stage.
- **RESOURCES**
Elements that define the key figures and the stage.
This can refer to the specific qualities of the subject or the context in which the ACTION is carried out.
- **MAIN VALUES**
Goals to achieve, tangible objectives.
Stage functionality indicators.
- **POSSIBLE OUTPUTS**
Measurable results that could be obtained after studying each stage which help to enrich each link in the value chain.

I.II THE VALUE CHAIN OF THE ANIMATION SECTOR INDEX

A. MAIN ACTIVITIES

To integrate the stages related to the **generation** of audio-visual animation products and their **launch onto the market**.

A.1. GENERATION stages

Those stages that make up the process of making the **final product**.

A.1.1. Content creation: talent

- Authors: Intellectual property (IP) rights owners and related rights owners.
- Digital talent in the industry.
- Professionals who are indirectly linked to animation.

A.1.2. Production: the production company and the audio-visual animation projects

- Animation production companies: profile and funding.
- Audio-visual animation projects: classification, funding and stages.

A.2. MARKET stages

Those which work directly with the **final product**, determining its value.

A.2.1. Distribution: sales

- Classification of agents.
- Profile.
- Role.
- Funding.

A.2.2. Consumption: offer and demand

- The audience: profile.
- Classification of content wanted.
- Viewing platforms.
- Offer of animation content.

B. SUPPORT ACTIVITIES

These include the stages which create the **necessary conditions** to make the European animation sector grow as a whole.

B.1. Education: Training and Update

- Educational centres: classification.
- Training programmes: classification.

B.2. Regulations and funding: The legal framework

- Public support measures for the audio-visual industry.
 - Direct funding.
 - Indirect funding.
- Private funding.

B.3. Conservation: The future

- Organisations.
- Funds.

C. ANNEX

The **spaces for dialogue** between the agents of the animation sector value chain.

C.1. Networking: Forums and Markets

THE VALUE CHAIN OF ANIMATION

MAIN ACTIVITIES

Integrate the stages related to the **generation** of audio-visual animation products and their **launch onto the market**

A.1.1. Content creation

Talent

Key figures: Original creators (rights owners – IP and related) and digital talent (artists and other professionals)

Actions: Concept and development of the concept

Resources: CV, competencies, languages, mobility

Main values: Creative community

Possible outputs: “Digital Talent” database

Definition

This stage firstly includes the **authors, owners of the intellectual property (IP) rights** and the **owners of the related rights**.

- Authorship (books, graphic novels, comics, video games).
- Script (original or adapted idea), director and/or animation director, director of photography and original music.
- Production.

The second block is composed of the different professionals that make up the **digital talent** in the industry.

- Direction team: (Director/ Director of animation/ Assistant director/ Script supervisor/ Assistant to the director).
- Production team (Executive producer/ Production manager/ Line producer/ Assistant producer/ Assistant location manager/ Production secretary/ Studio supervisor).
- Script team (Scriptwriter/ Script coordinator/ Script doctor/Gagman).
- Director of art/ Concept artist.
- Storyboard artist.

- 2D/ 3D/ Stop motion animation team (Animator/ Character Designer, Decorations and Props/Background Artist/Colourist/Model Maker/Texture Artist/Layout Artist/Technical Director/Lighting Artist/Technical Director of Visual Effects/Special Effects Artist –FX TD–/Rigging Artist/Renderer/Lip Sync Specialist).
- Photography team (Camera operator/First assistant camera operator/ Focus puller, Second assistant camera operator).
- Sound team (Sound director/ Sound assistant/ Second sound assistant).
- Post-production team (Composer/ Voice actors/ Dubbing director/ Postproduction supervisor/ Editor / Editor assistant/ Sound designer.
- Distribution team (Sales executive/ Marketing executive).

Finally, the **professionals who are indirectly related to animation will be taken into account.**

- Dubbers, other VX artists, musicians, licensees, toy designers, agents or editors.

The latter section will not be subject to this study; however, it is helpful to bear it in mind when promoting dialogue between all the agents of the value chain in a territory's animation sector.

Objectives

- The main objective is to provide a SWOT analysis on creation, which will be useful for planning measures in the next step, as well as to identify the **issues with conserving intellectual property.**
- Identify the most **sought-after** professions and the most requested **competencies.**
- Measure the impact on the animation sector in terms of **qualified employability.**

We want to know:

- The role of creators in the animation industry.
- The professional profiles the market demands.
- The identification —qualitative and quantitative— of digital talent.
- The volume of indirect professionals who also participate in the animation sector.

Approach

- Surveys to be performed by employees and freelancers in the sector.
- Collaboration with the Departments in charge of Work and Employment.
- Collaboration with professional associations or institutions (Such as Film Commissions, Cinematography Institutes or Agencies for the promotion of the audio-visual industry).

Main variables and indicators

The number of professionals in a territory who are directly related to the production of audio-visual animation projects, broken down by category and including the widest spectrum there could be in a production, in its development, pre-production, production, post-production and distribution phases. These numerical indicators will help us to understand, among other elements, the employability of the sector compared to other industrial sectors, or the level of disparity between training and employment. *(Fig. A.1.1)*

FIG. A.1.1.- Classification of jobs

Producer	
Direction Team	Director/Director of Animation
	First AD
	Script supervisor
	Second AD
Production team	Executive producer
	Production manager
	Line producer
	Assistant producer
	Assistant location manager
	Production secretary
	Studio supervisor
Script team	Scriptwriter
	Script coordinator
	Script doctor
	Gagman
Animation team	Director of art
	Concept artist
	Storyboard artist
	Animator
	Character designer
	Decorations' designer
	Props' designer
	Background artist
	Colourist
	Model maker
	Texture artist
	Layout artist
	Technical director
	Lighting artist
	Technical director of visual effects (FX TD)
	Special effects artist
	Rigging artist
Renderer	
Lip sync specialist	

FIG. A.1.1.- Classification of jobs (cont.)	
Photography team	Director of photography
	Camera operator
	First assistant camera operator
	Focus puller
	Second assistant camera operator
Sound team	Sound director
	Sound assistant
	Second sound assistant
Post-production team	Composer
	Voice actors
	Dubbing director
	Post-production supervisor
	Editor
	Assistant editor
	Sound designer
Distribution team	Sales executive
	Marketing executive
Indirect jobs (Optional)	Dubbers
	Other VX artists
	Musicians
	Licensees
	Toy designers
	Agents or editors

Profile of the professionals who are exclusive to animation productions, considering basic demographic indicators such as age, disability, nationality or residency in order to calibrate aspects such as the mobility of talent, the inclusion of women and people with disabilities in the sector, or the index of employment for young people among other factors, but also performance indicators such as the professional group, the type of contract or net income, or evaluation indicators, such as those related to education and the training environment (knowledge). (Fig. A.1.1-2)

FIG. A.1.1-2.- Professional profiles		
Gender		
Age		
Disability		
Place of residence		
Nationality	European	
	Non-European	
Languages	Native language	
	Native language +1	
	Native language +2	
	Native language +3	
	More than 5	
Level of education	Obligatory education	
	Secondary education	
	Professional training	
	Vocational training certificate	
	Diploma course	
	Bachelor's degree	
	Master's degree	
	Doctorate or equivalent	
Occupational status	Director	
	Executive	
	Employee	
	Animator	
	Apprentice	
	Other	
	Contract	Salaried worker
Part time		
Self-employed worker		

FIG. A.1.1-2.- Professional profiles (cont.)

Average income* * SMI (minimum interprofessional salary) for the country of residence, updated.	Equal to the SMI		
	Between the SMI and 2 x SMI		
	Between 2 x SMI and 5 x SMI		
	Over 5 x SMI		
Knowledge	Acquired	Graphic design software	
		Animation software	ADOBE ANIMATE SUITE, ADOBE
			SYNFIG STUDIO
			OPENTOONZ
			BLENDER
			AUTODESK MAYA
			TVPAIN
			AUTODESK 3DS MAX
			CINEMA 4D
			3D STUDIO MAX
			CHARACTER ANIMATOR
			MOHO (ANIME STUDIO)
			POSER
			HOUDINI
	DRAGONFRAME		
	STOP MOTION STUDIO		
	Other		
	Natural	Drawing	
		Other IT-related knowledge	
		Motion Graphics	
		Other	
		Creativity	
		Imagination	
Attention to detail			
Communication			
Teamwork			
Other			

A.1.2. Production

The production company and the audio-visual animation projects

Key figures: production companies

Actions: development, pre-production, production and post-production

Resources: funding tools for the company and projects

Main values: Sustainable business sector

Possible outputs: Increased production of audio-visual animation projects in a territory

Definition

In this stage, we first talk about the **production company**, given its fundamental role as an agent that merges both the creative and financial resources which will enable the audio-visual animation project to be properly carried out, as well as its role as the engine behind the ecosystem of cultural industries in a specific territory.

Secondly, we approach the product itself: the **audio-visual animation project** in its different formats, since this involves different production formulas and therefore, a different relationship with the other links in the value chain.

Lastly, we identify the ecosystem of **connected companies**, which depend, interact or determine the **production process** of an audio-visual work.

Objectives

- We aim to obtain a SWOT analysis of the strengths and weaknesses of the internal environment of the production company and for the production process of the audio-visual animation project, which will be useful when it comes to planning efficient measures in the next phase, and in the identification of issues with regard to the preservation of the IP.

- Likewise, at this stage it is recommended to use a description of the external environment —via political, economic, sociocultural, technological, sustainable, and legal factors— and obtain a PESTEL analysis which will enable the prevention of potential negative impacts in the business sector.

We want to know:

- The identification and quantification of the volume of business involved in animation production, within the audio-visual ecosystem of a specific territory.
- The identification and quantification of the importance of the production company, within the value chain of the sector.
- The identification of the most fragile stages of the production company.
- The identification of the most fragile stages of the production process.
- The classification and quantity of audio-visual animation projects in a specific territory.
- The volume of audio-visual animation projects in a specific territory, in relation to the total number of audio-visual works produced in that territory.
- The sources of funding available to the company and the project.
- The business models and strategies used by animation companies.

Approach

- Surveys to be completed by production companies.
- Collaboration with institutions (Such as Ministries for Culture, Film Commissions, Cinematography Institutes or Agencies for the promotion of the audio-visual industry).
- Collaboration with audio-visual production associations and federations.

Main variables and indicators

The production company

The production company will be analysed from a **quantitative** perspective; by identifying areas of business concentration and its systemic balance within a specific territory and, also from a **structural** perspective — referring to the legal status, its age, average annual revenue and the average number of professionals employed (the degree of inclusion should be reflected: gender and disability, and age) — and its **business model** will also be studied: *(Fig. A.1.2-1)*

- Own IP: if the company develops its own content, it is the owner of industrial property and therefore has this important economic asset.
- Production services for other companies: the production company works for the owner of the IP, and its only economic asset is the cost of performing the service.

FIG. A.1.2-1.- Profile of the animation production company		
Name		
Legal status		
Independent	YES	
	NO	
Year activity began		
Location		
Average annual revenue		
Employees	Contracted	Full time
		Part time
	Self-employed	
Type of business	Own IP	
	Services	

A territory with a high number of production companies that generate their own IP is a territory with a large intangible asset, since a strong IP gives the company high market value, which should be understood as an increase in its own means when accessing various sources of funding, as a potential payment contribution or guarantee. **Successful IPs are intangible assets with an indefinite duration, which bring wealth to a territory.**

Lastly, the **funding sources and instruments of the production companies** will be studied (Fig. A.1.2-2). The creation of a regulatory, tax and economic framework which enables the **creation and maintenance of sustainable production companies**, and distinguishes between immediate investment tools (support policies for start-ups, incentives for the creation of employment, investment in the improvement of infrastructure or technological innovation) or those which maintain the stability of the business as a whole.

The development and production of content is perhaps the link with the most risk in the animation value chain; therefore, the identification of successful public policies which favour the sustainable growth of the content production business sector, will be one of the successes of this study.

FIG. A.1.2-2.- Sources of funding and the funding instruments of the companies			
Public sources	Grants	Depending on the purpose of the grant	Start-ups
			Infrastructure
			Technological innovation
			Promotion of employment
		Depending on the territorial scope	Supra-national
			National
			Territorial
			Other
		Depending on its return	Refundable
	Non-refundable		
Financial facilities	Credit		
	Guarantee		
Other			

FIG. A.1.2-2.- Sources of funding and the funding instruments of the companies (cont.)

Private sources	Financial facilities	Credit
		Guarantee
	Crowdfunding	
	Crowdlending (Peer-to-Business leading)	
	Venture Capital	
	Business Angels	
	Private equity	
	Sponsoring	
	In-kind donations	
	Other	
Other		

The audio-visual animation project

The audio-visual animation project, nucleus of the animation value chain, has to be approached from three perspectives:

- Firstly, a **quantitative and qualitative classification** of the project itself: number of productions of a territory, but also categorisation based on its premiere screen, its format, the technique used, the cost and the original version. *(Fig. A.1.2-3)*
- Secondly, and studying the specifications **with regard to its funding**, via public instruments (subsidies and financial facilities), co-production structures or other tools. *(Fig. A.1.2-4)*
- Lastly, the **different phases of the production process** will be analysed: development, pre-production, production and post-production, in order to obtain temporal, economic and employment indicators from each of them. *(Fig. A.1.2-5)*

This comprehensive view of the audio-visual animation product will enable the identification of the weakest points of the production process, which will need to be reinforced via public policies which will enable on the one hand, the creation of competitive IPs and their preservation in the territory, the retention of talent and investment in and creation of cross-border marketing and collaboration networks.

FIG. A.1.2.-3.- Classification of the animation audio-visual projects

Premiere	Format		Technique	Total cost (single/episode)	Original version (ALICE territories)
Cinematographic	Single	Short film	3D	< €150,000	English
					French
				€150,000–€500,000	Walloon
					Italian
		Feature film	2D	€500,000–€850,000	Polish
					Slovakian
Non-cinematographic	Serialised (Number of episodes, duration and seasons)		Stop Motion	€850,000–€1.2 M	Spanish
					Catalan
	Other		Other	€1.2 M – €2.5 M	Another language
			> €6 M		

FIG. A.1.2-4.- Funding sources and tools for audio-visual projects

1.- PUBLIC FUNDING			% Out of the total cost
Territorial scope	Supra-national	MEDIA	%
		EURIMAGES:	%
		IBERMEDIA	%
		Other	%
	National		%
	Territorial		%
	Other		%
Legal status	Refundable		%
	Non-refundable		%
2.- FINANCIAL FACILITIES		% Out of the total cost	% Out of the IP
Gap financing	Credit	%	%
	Guarantee	%	%
Cash rebate		%	%
Tax incentives	Tax rebate	%	%
	Tax credit (transferable)	%	%
	Tax credit (non-transferable)	%	%
	Tax shelter	%	%

FIG. A.1.2-4.- Funding sources and tools for audio-visual projects (cont.)

3.- CO- PRODUCTION		% Out of the total cost	% Out of the IP
Territorial scope	Territorial	%	%
	National	%	%
	European	%	%
	International	%	%
Type of co-producers	Independent production company	%	%
	Private provider of linear audio-visual services	%	%
	Public provider of linear audio-visual services	%	%
	Video on demand (VOD) platform	%	%
	Private investor	%	%
	Other	%	%
4.- OTHERS		% Out of the total cost	% Out of the IP
Pre-sales	Private provider of linear audio-visual services	%	%
	Public provider of linear audio-visual services	%	%
	Video on demand (VOD) platform	%	%
	Other	%	%
Minimum Guarantee (MG)		%	%
Private capital		%	%
In-kind donation		%	%
Instalments		%	%
Other		%	%

FIG. A.1.2-5.- Phases of the audio-visual animation project

CONCEPT	Development	Pre-production	Production	Post-production
Duration (in weeks)				
Related professionals (number)				
Public funding				
Private funding				
% Expense out of the final cost				

Ecosystem of connected companies

In order to adequately weigh up the economic importance and employability in the audio-visual animation content production sector in a specific territory, we recommend the identification and analysis of companies related to the animation project, such as **studios, dubbin companies, licensing companies, toy companies** and **editors**.

A.2.1. Distribution

Sales

Key figures: distribution companies, international sales agents, television chains, streaming platforms and carriers

Actions: marketing and sales management

Resources: presales, GMs, subsidiary rights, merchandising

Main values: ROI (return on investment)

Possible results: open database of distributors and sales agents

Definition

In animation, distributors play a key role, one that's even more relevant if we compare it to that of a real-image production, basically because much more time is needed for development and production.

Compared to producers, their role implies much earlier commitment. That's why, in the market, above all there are distributors or sales agents specialised in animation.

Even in the largest studios, there are independent departments that specifically manage animation productions.

The financial resources contributed by the distributors (MG or minimum guarantee) are one of the axes on which independent producers can construct the audio-visual animation project; helping the entire ecosystem of the cultural industries in a territory move forward.

In the past, public funding and television channels played a leading role in funding audio-visual animation projects; however, nowadays streaming platforms have taken the forefront, as they require more new and fresh content for their channels, but sometimes (and this is happening more and more) they require the complete IP, which is a crucial loss of an asset for a producer.

The platforms, carriers and also the television channels act as distributors, since audio-visual projects benefit from the large markets: the average costs per spectator reduce as numbers increase, which accelerates and multiplies the return on investment. In this regard, it is appropriate to establish public policies that guarantee the cultural diversity of European animation content, especially those intended for children; protecting independent production and distribution.

The current trend is that the distributor is able to participate in different roles with regard to the animation project, and these new mixed figures should be analysed in which the distributors act simultaneously as co-producers, exhibitors or, directly, as producers.

Objectives

- Our objective is to provide a SWOT analysis of the distribution that is useful for planning measures in the next step.
- To identify the issues with preserving intellectual property.
- To identify how to protect European content in the current distribution model.
- In addition, at this stage it is recommended to use a description of the external environment —via political, economic, sociocultural, technological, sustainable, and legal factors— and obtain a PESTEL analysis which will enable the prevention of potential negative impacts in the business sector.

We want to know:

- The economic importance and employability in the distribution sector in the animation value chain.
- The effects public policies have on protecting the distribution of independent European animation.
- Any significant business differences between cinematographic and non-cinematographic distribution for animation projects.
- The business volume that distributors contribute to animation production companies.
- Innovative funding forms for audio-visual animation projects by the distributors.

Approach

- Surveys to be completed by distribution companies.
- Collaboration with institutions (Such as Ministries for Culture, Film Commissions, Cinematography Institutes or Agencies for the promotion of the audio-visual industry).
- Collaboration with audio-visual distribution associations and federations.

Main variables and indicators

Firstly, the **classification of the various figures related to sales will be analysed** —agent or distributor— distinguishing in the latter whether they are independent or not. In the case of audio-visual service providers, we will discuss whether they are linear or non-linear, and whether they are public or private.

Their **structural indicators** (total number in a territory, business volume and employability -indicating metrics of inclusion such as gender and disability, and age-, location and age of the companies) will also be studied, as well as their **specialisation profile** depending on the format of the distributed audio-visual projects.

The **role** they play with regard to the production of the audio-visual project and the **tools used to finance them**, will be variables that offer a current vision on the role of distribution in the animation value chain. (*Fig. A.2.1-1*)

This panoramic vision will help a territory to establish efficient mechanisms that will guarantee cultural diversity in the distribution of European audio-visual animation content by implementing grants for the internationalisation of the content (*content travelling*) such as support for dubbing into different languages and digital promotion tools and online and offline marketing (advisory services, professionalisation and implementation) or defining public programming strategies (via establishing fees in the public or domestic sphere) and in educating the audience.

FIG. A.2.1-1.- Profile of the animation distribution company

Classification	Independent		
	Not independent		
	Distribution companies		
	Sales agents		
	AV linear communications service providers	Private	
		Public	
	AV non-linear communications service providers	Private	
		Public	
	Carriers		
	Other		
Profile	Name & Legal status		
	Age of the company		
	Location		
	Annual revenue (based on the last year)		
	Number of people employed		
	Types of audio-visual projects	By exhibition platform	Cinematographic
			Non-cinematographic
		By format	Single
			Serialised
		By duration	Feature film
Short film			
Other			
Role	Acting only as distributor		
	Acting as sales agent		
	Acting as co-producer		
	Acting as producer		
Funding tools for the audio-visual animation project	Minimum Guarantee (MG)		
	Distribution fees		
	Advanced payments		
	Additional sources of funding (not acquisitions)	Public subsidies	Supra-national
			National
			Territorial
			Other
Financial facilities			
Other			

A.2.2. Consumption

Offer and demand

Key figures: Content, spectators and screens

Actions: Audio-visual consumption

Resources: Cinema tickets, subscribers and audience indexes

Accessibility to content

Main values: Development of the audience and monetisation of the content

Possible results: Increase in the consumption of audio-visual animation content

Definition

The consumption of audio-visual content is perhaps the stage of the animation value chain that has suffered the biggest change over the last few years, with the COVID-19 pandemic marking a turning point whose latest dimension in terms of the change in habits cannot yet be assessed.

It is understood that consumption is the stage that gives the final value to audio-visual projects, directly monetising its audience (cinema tickets and rental, audience index in linear channels or the number of viewings in digital consumption), but also strengthens the value of the intangible asset of the IP, via the recognition of a brand, which will enable the creation and sale of derivative products (merchandising) and its transmedia and cross-media evolution.

Therefore, to assess this fundamental cog in the chain and its value, not only do we have to perform an **analysis on the nature of the public and on the audio-visual projects**, but also on how the audience **accesses content**, with regard to technological aspects (territories with greater digital infrastructure, the population's digital media literacy index), economic aspects (access to networks and devices, average cost of a cinema ticket compared to the SMI), or market aspects (domestic and out-of-home offer of audio-visual content providers in a

territory, variety of the content offered and positioning and prominence algorithms² of the contents in digital providers), among other matters.

This assessment must go hand-in-hand with the knowledge of the public strategies that affect each territory, since they will be determining factors in the creation of audiences.

Objectives

- Identify audio-visual consumption tendencies.
- Understand the new habits of the spectators in order to facilitate:
 - Access to audio-visual animation content.
 - The adaptation of content, promotion and strategies in exhibition platforms by the producers, distributors and exhibitors.

We want to know:

- Who sees the animation content.
- What type of animation contents are most wanted.
- How and where animation content is consumed.
- How animation content consumption can be improved.

Approach

- Studying reports of quantitative data on the audiences:
 - Individual audience in a territory (linear and non-linear consumption),
 - Annual box office reports from the Film Institutes.
 - Analysis of the internet audiences via passive methods (*web centri*).

² **prominence** in this context should be taken to mean “the promotion of the projects via facilitating access to them, giving them precedence in their recommendation algorithms and highlighting their placement on a screen (implementing tools for direct access in the catalogue, highlighting their presentation on the screen and position on the logical screen.)”

- Surveys to be filled in by Festivals and Showcases on their attendance by the public.
- Collaboration with rights management entities for producers.
- Collaboration with libraries, civic centres, and educational institutions in order to monitor activities that include audio-visual animation content.
- Quantitative study on the audience, via surveys performed on representative samples of spectators in a territory.
- Studying the offer of audio-visual animation projects in a territory via collaborations with initiatives such as [MAVISE](#) or [Lumière VOD](#).

Main variables and indicators

In this stage, we'll study audio-visual consumption from four perspectives:

The first one, related to the audience, will analyse the public via **demographic indicators** (gender, age, disability, location, educational level, occupation, and level of income) which will provide an updated image with regard to the contemporary audience of audio-visual animation projects. (*Fig. A.2.2-1*)

FIG. A.2.2-1.- Audience profile (demographic indicators)

Age			
Gender			
Disability			
Location	Country		
	City	More than 3 M inhabitants	
		1 M–3 M inhabitants	
		500,000–1 M inhabitants	
		100,000–500,000 inhabitants	
		50,000–100,000 inhabitants	
		10,000–50,000 inhabitants	
		Fewer than 10,000 inhabitants	
Level of education	Basic obligatory education		
	Secondary education		
	Professional training		
	Vocational training certificate		
	Diploma course		
	Bachelor's degree		
	Master's degree		
	Doctorate or equivalent		
	Other		
Occupation	Employment status	Active	Worker
			Unemployed
		Not active	Student
			Retired
			Other

FIG. A.2.2-1.- Audience profile (demographic indicators) (cont.)

Occupation	Occupation European Standard Classification of Occupations (ESCO)	Armed forces occupations
		Managers
		Professionals
		Technicians and associate professionals
		Clerical support workers
		Service and sales workers
		Skilled agricultural, forestry and fishery workers
		Craft and related trades workers
		Plant and machine operators and assemblers
		Elementary occupations
		Other
	Employment sector ISCED-F 2013	Education
		Arts and humanities
		Social sciences, journalism and information
		Business, administration and law
		Natural sciences, mathematics and statistics
		Information and communication technologies
		Engineering, manufacturing and construction
		Agriculture, forestry, fisheries and veterinary
		Health and Welfare
Services		
Other		
Average income per household* <small>*Minimum inter- professional salary in the country of residence, updated.</small>	Equal to the SMI	
	Between the SMI and 2 x SMI	
	Between 2 x SMI and 5 x SMI	
	More than 5 x SMI	
Members in the household	1	
	2	
	3	
	4	
	5 or more	

The second refers to the **classification of content**, including format, technique, nationality, original language and target. (Fig. A.2.2-2)

FIG. A.2.2-2.- Classification of animation content consumed by audiences						
Format	Technique	Language		Nationality	Target	
Short film	3D	Original version	Subtitled	European	Children	Preschool
Feature film	2D		Not subtitled			3–6 years
Series	Stop Motion	Dubbed		Non-European		6–9 years
Other	Other				9–12 years	
					Adolescents	12–16 years
					Adults	16–18 years
					All the family	

In addition, the analysis should be focused on the **viewing platforms**, which are classified according to three concepts determined by the new consumption habits:

- Individual (including the family unit) or collective, substituting the traditional classification referring to space (domestic/outside the home), via the personal viewing platform, which can be consumed either outside or inside the home —using laptops, tablets or smart phones— or collective viewing platforms in cinemas or other spaces shared with other viewers.
- Linear or non-linear, depending on the interaction the spectator has with the screen concerning a specific audio-visual project.
- By the technological support used by the audience, as this will be a determining factor when choosing content.

The study on the viewing platforms must also contain information on (annual) cost and frequency of use (in days or weeks for individual viewing platforms or in months or annually for collective viewing platforms). (Fig. A.2.2-3)

FIG. A.2.2-3.- Classification of the viewing platforms

Platform				Frequency of use	Cost of use	
Individual	By the interactivity of the spectator	Linear	Free-to-air mobile TV	International	Average daily consumption	Average annual cost
				National		
				Territorial		
				Local		
				Other		
		Pay-per-view	International			
			National			
			Territorial			
			Local			
			Other			
	Other	IPTV (Internet protocol TV)				
	Non-linear	OTT	VOD Platform			
			SVOD Platform			
			Sharing Video Platform			
			Other			
	Other	Other				
	By technological support	Smart TV				
No Smart TV						
Computer		desktop				
		laptop				
Tablet						
Smart Phone						
Other						
Collectively	Cinemas	In the cinema		Average annual consumption		
		Festivals.				
		Other				
	Other					

Lastly, in order to gain comprehensive knowledge on audio-visual consumption we must very much bear in mind from a quantitative perspective what the **offer of audio-visual content is in a territory**: number of free-to-use channels or platforms (VOD or SVOD) that are accessible upon subscription and which broadcast animation content in a territory, the number of cinemas or percentage of animation projects exhibited (out of the total number of films screened) or the number of festivals and showcases dedicated to animation in the territory. (Fig. A.2.2-4)

FIG. A.2.2-4.- Offer of animation content

TYPE OF PLATFORM			Number accessible in a territory	With animation content	% of animation content over the total	
Individual	Linear	Free-to-air	International			
			National			
			Territorial			
			Local			
			Other			
		Pay-per-view	International			
			National			
			Territorial			
			Local			
			Other			
	Non-linear	IPTV (Internet protocol TV)				
		OTT	VOD Platform			
			SVOD Platform			
			Sharing Video Platform			
Other						
Other						
Other						
Collectively	Cinemas					
	Festivals and showcases	free				
		paid				
Other						

To correctly assess this stage, it is recommended to incorporate the variables that should be considered with regard to the **territory's technological infrastructure**: what percentage of the population has access to an internet connection, and what is their level of connectivity (fibre optic, 5G, 4G, 3G or other), since this will significantly affect the consumption habit of audio-visual content.

SUPPORT ACTIVITIES

These include the stages which create the **necessary conditions** to make the European animation sector grow as a whole

B. 1. Education

Training and refresher training

Key figures: Educational institutions

Actions: Educational programmes

Resources: Official certificates, internships and continuous training

Main values: Synchrony between training and industry

Possible outputs: Greater employability among graduates and a reduction in the loss of talent

Definition

This stage is focused on the acquirement of knowledge and professional skills, and their indicators and key variables are mainly linked to training for employability in the production process of an audio-visual animation project.

The two structural pillars related to training in the animation sector will be addressed (from a quantitative and qualitative perspective):

- Educational institutions
- Educational programmes

Studying this stage is imperative for designing a sustainable ecosystem for the animation sector and to achieve the retention of talent:

- On the one hand, synchronising training with business demands is key and will enable widespread employability in a territory and therefore, the retention of local talent.
- On the other hand, achieving excellence in training is what will guarantee, in the future, high-quality productions with international potential and which can compete on a global scale. This will strengthen and extend the industrial foundation of the sector in a territory and increase employment demand, and therefore, the retention of talent.

The parallel study of this link in the value chain in various European territories will enable the standardisation of training and democratisation in employment opportunities for digital talent.

It will also be a good future tool to boost European co-productions, since it will result in a standard of excellence in the professionalisation in the different territories.

Objectives

- Train future, qualified professionals who are experts in the latest trends in the sector.
- Keep the training of working professionals up-to-date.
- Synchronise training programmes with the real needs of the animation industry.
- Design effective internship programmes involving both educational institutions and companies.
- Establish a common European reference standard related to digital credentials and interoperability.

We want to know:

- The offer, in a territory, of educational centres and programmes that are focused on animation.
- The offer of training, related to animation, which is available to keep professionals up-to-date.
- The relationship between educational programmes and the real needs of the industry.
- The existence and adaptation of dialogue platforms concerning training, the industry and administration.
- The difficulties in accessing training and refresher training (economic, technological or accessibility).

Approach

- Cooperation with the Ministries of Culture, Education, Work and Employment (for regulated certifications) and with the regional/local political institutions where necessary, in order to understand the training and employment policies in a particular territory.
- Acquiring knowledge on European training programmes, educational-related classifications and professional categories.
- Surveys to be completed by:
 - Training centres
 - Working professionals
 - Production companies

Main variables and indicators

For the analysis of this stage, training has been considered from a dual standpoint, including **educational centres** and **training programmes**, in two distinct blocks.

Educational centres

Educational centres should be studied with regards to the standardisation of their certificates (whether their teaching is regulated or non-regulated) within the national education systems —and whether they meet European standards or not—, the certifications they offer, their funding (public, private or mixed centres), but also from the perspective of their accessibility, with the latter being determined by indicators such as the cost of enrolment or the existence of scholarships, the limited quota or numerus clausus, whether they have entrance examinations or their methodology (in-person, remote or mixed).

Another fundamental dimension will be given by its students, demographic factors such as age, gender, disability, or geographical location but also by information regarding their employment situation (active —individuals who are working or unemployed—, or passive —students, retirees— and whether they have had prior training or not.

A final determining aspect will be the percentage of employability of ex-students and where they found that employment opportunity. (Fig. B.1-1)

FIG. B.1-1.- Classification of educational centres		
By their official recognition	Regulated training	
	Non-regulated training	
By their qualifications	Certificate	
	Degree	
	Professional training qualification	
	Diploma course	
	Bachelor's degree	
	Master's certificate	
	Doctorate	
	Other	
By their source of funding	Public	Supra-national
		National
		Territorial
		Other
	Private	
	Mixed	
	Other	
By their cost	Free	
	Paid	Scholarships
		Enrolment
		Fees
		Other
Other		
By their access	<i>Numerus clausus</i>	
	Competitive basis	
	Free access	
	Other	

FIG. B.1-1.- Classification of educational centres (cont.)

By their methodology	In-person	
	Remote, e-learning	
	Mixed	
	Other	
By their students	Number	
	Gender (%)	
	Disability (%)	
	Age (average)	
	Origin (%)	Local
		The same country
		International
	Employment status (%)	Active
		Not active
Prior educational level (average)		
On scholarships (%)		
By their post-qualification employability	Success ratio	
	Location	In the same territory
		Outside the territory (Same country)
		Outside the territory (Europe)
	Outside the territory (Other)	

Training programmes

Studying this last block is a determining factor for optimising synchrony between education and industry and it will be approached from different angles: (Fig. B.1-2)

- The duration of the programme and the teaching methods used (in regard to whether learning is in-person or not, training outside of the classroom, the procedural approach and the supervision of progress in the training).
- The mobility —local, national or international— offered by the programme via exchange agreements with other centres, internship agreements with companies and similar.
- The skills the programme develops.
- The specific subjects taught, which are in sync with those listed in the section on professional profiles.

FIG. B.1-2 Classification of educational programmes

By their duration	Long-term duration (more than 3 years)
	Mid-term duration (1–3 years)
	Short-term duration (less than 1 year)
	Intensive programme (less than one month)
	Seminar
	Course lecture
	Other

FIG. B.1-2 Classification of educational programmes (cont.)

By their teaching methods	Face-to-face nature	Total
		Hybrid
		Remote
	Training outside the classroom	Traineeships or internships
		Workshops
		Training trips
		Other
	Approach	Experimental learning
		Simulation and serious games
		Training on visual thinking
		Other
	Supervision	Tutoring sessions/coaching/mentoring
		Self-taught
Other		
Other		
By the mobility of the programme	Supra-national	Europe
		Other
	National	
	Territorial	
Other		
By skills	Basic IT skills	
	Advanced IT skills	
	Innovative digital technologies	
	2D and 3D modelling and animation	
	Business and management initiative	
	Team management	
	Social skills	
	Administration, accounting and finances	
	Languages	
	Occupational health and safety	
	Sustainability skills	
Other		

FIG. B.1-2 Classification of educational programmes (cont.)

By subjects	2D-3D Graphic design software	
	Animation software	ADOBE ANIMATE SUITE, ADOBE
		SYNFIG STUDIO
		OPENTOONZ
		BLENDER
		AUTODESK MAYA
		TVPAINT
		AUTODESK 3DS MAX
		CINEMA 4D
		3D STUDIO MAX
		CHARACTER ANIMATOR
		MOHO (ANIME STUDIO)
		POSER
		HOUDINI
		DRAGONFRAME
		STOP MOTION STUDIO
		Other
	Drawing	
	Operating systems	
	Prototypes	
	Directing	
	Motion Graphics	
	Script	
	Creativity	
	Communication	
	Team management	
	Time management	
Project management		
Languages		
Other		

B.2. Funding and regulations

The legal framework

Key figures: Public and private bodies that finance the animation sector

Actions: Improvement and harmonisation of the regulatory framework in the various territories

Resources: Legal framework (supranational, national and territorial), that determines the financial and tax instruments for the promotion of the audio-visual industry in a particular territory

Main values: Support tools for the animation sector

Possible results:

- Improvement in funding for the audio-visual animation projects
- Improvement in the production and co-production of European animation projects
- Updated database on tools and support measures and the promotion of the animation sector in each territory

Definition

This stage is focused on the analysis of the legal, financial and tax frameworks that affect the animation sector in a particular territory, since its capacity for growth will be determined by this framework, which predetermines:

- Direct public aid (which is understood to be those such as contributions that are earmarked or returnable and granted by the public bodies in the different links of the value chain, such as subsidies and cash rebates).
- Tax incentives and financial facilities, which directly affect the entrance of private investors, the attraction of foreign investment and the attainment of guarantees from banking and credit entities, and therefore, the cash flow in the sector.

When studying these constraints, special attention must be paid to the obligations imposed on the different agents of the audio-visual value chain:

- Either financial (via direct investment in production, via contribution to a public fund which will be the fund that manages public aid for the promotion of the audio-visual industry in a particular territory).
- Or those related to the broadcasting and exhibition of audio-visual content, a measure that will seek an increase in its demand, and therefore, greater production and more industry.

This framework must be acutely aware of a European vision, due to the competencies it is conferred by the EU Treaties and which will determine aspects such as the maximum percentage of public support that can be granted to a project (including direct funding and tax incentives), activities that can be funded (for example, isolated parts of the production process cannot be financed), or issues related to equal competition between companies and territories, and the protocol, capacity and time required when redrafting and amending regulations that may enable greater growth in the sector.

We therefore understand that having an in-depth understanding of this stage, and disclosing said knowledge to the main agents detailed throughout this study, will allow more favourable and synchronised scenarios to actually be designed that will respond to the sustainable growth needs of the entire animation ecosystem.

Objectives

To identify the different support strategies available to the audio-visual animation sector in each territory; discovering the best practices that may enable sustainable growth of the animation ecosystem in order to adapt the public policies to the less-developed territories, with the aim of designing (in the mid/long-term) strategies to:

- Reinforce the European animation industries (SMEs).
- Improvement the competitiveness of European animation projects.
- Retain European talent.

We want to know:

- The best public support practices for the sector.
- The best private support practices for the sector.

Approach

- Studying the regulatory framework and its repercussions in promoting the sector, via the Cinematographic Institutes and other national, territorial and local public support bodies for the sector.
- Identifying the support tools, but also the purpose of the support (professionals, companies or projects) and the phase in the animation process in which the support is received.
- In addition, the compatibility between the different European frameworks must be studied.
 - Collaboration with the Departments in charge of Culture, Industry and Tax.
 - Collaboration with the agencies involved in public/private audio-visual funds.
 - Surveys to be completed by the funding bodies.
 - Studying private investment, via surveys that should be completed by animation companies; identifying the most common private investors.

Main variables and indicators

Public tools for promoting the audio-visual industry

Firstly, we must identify the body granting the funds and the regulations by which its form of financing to the sector is defined (laws, royal decrees, directives, development regulations, etc.) the budgetary programme in which the provision for direct funding is set out (name and duration of the programme) and its territorial scope. *(FIG. B.2-1a)*

FIG. B.2-1a PUBLIC TOOLS FOR PROMOTING AV (Audio-visual) PROJECTS

Regulatory framework	
Granting institution	
Name of the fund	
Budget programme	
Territorial scope	Supra-national
	National
	Territorial
	Other

We considered it appropriate to divide the public tools for promoting the audio-visual industry (focusing on promoting animation and ruling out real images) into two categories; distinguishing whether it is via direct or indirect funding.

Direct funding

We considered “direct funding” to be total or partial financed by public grants, receiving a monetary amount, either via a competitive basis, or via automatic assignation if the applicant meets certain requirements. In this category, we included mechanisms such as cash rebate or grants in the form of reimbursable contributions—in the case where the grant must be completely or partially returned based on certain pre-established success criteria by the granting institution, as is the case of Ibermedia or Eurimages—or subsidies, if the amount is granted as non-refundable funding, or a combination of the two. (FIG. B.2-1b)

FIG. B.2-1b PUBLIC TOOLS FOR PROMOTING AV (Animation)

Direct funding	Cash rebate					
	Grants	Information:	Financial support (name)			
			Nature	Subsidy		
				Refundable contribution		
				Other		
			Annual calls	Number		
				Frequency	Fixed	Variable
		Provision	Total			
			Maximum per application			
		Classification	Depending on the applicant	Individual		
				Legal entity		
			Depending on the purpose	Training		
				Employment		
				Structure	Foundation	
Growth						
Transformation						
Consolidation						
Other						
Activity	RDI					
	Creation					
	Production					
	Distribution					
	Promotion					
	International expansion					
	Exhibition					
	Digitalisation					
Other						
Product		<i>See FIG. B.2-1-b bis</i>				
Other						

For the detailed analysis on the grants, determining variables and the development and consolidation of the audio-visual industry in a particular territory, we have established two categories:

- Firstly, the technical information, name, nature (returnable or not), as well as any considerations with regard to the total provision of the financial support and the maximum that can be granted per application, the number of yearly invitations to tender and whether they are fixed or not. This information on the frequency that invitations to tender are held is very relevant in order to establish financial plans for the viability of audio-visual companies and the implementation of harmonisation criteria for the public funding sources of a particular territory is recommended.
- The second category distinguishes between the classification of support depending on the applicant (individuals or legal entities) and depending on the purpose of the support: support for training (and training updates), the structure (divided depending on their life stages), on the activity to which the support and type of product which may receive the support is focused. The main variables of this last section are listed in the separate table below, given their importance in this study.

(FIG. B.2-1-b bis)

FIG. B.2-1b (bis) PUBLIC TOOLS FOR PROMOTING AV PROJECTS (Animation)

Direct funding ► Grants ► Classification ► According to the purpose	Product	Type	Single	Duration	Feature film	
					Short film	
					Other	
				Exhibition platform	Cinematographic	
					Non-cinematographic	
					Other	
			Format	Single		
				Serialised	First season	
					Other seasons	
			Contribution	With no co-production	National	
					Foreign	
				Co-production	Financial	
		National				
		International				
		Minority				
		Majority				
		Set of projects				
		Other				
		Stage	Script			
			Development			
Production						
Subtitling and dubbing						
International expansion						
Distribution						
Promotion						
Exhibition						
Amortization						
Reduction of bank interest						
Other						

Indirect funding

The second category that will be a determining factor for the promotion of audio-visual industry in a territory is made up of different tax-related and financial tools that will increase private investment, attract foreign capital, and create a framework in which the various agents of the audio-visual value chain will be obliged to promote the audio-visual industry in the territories in which they operate. (FIG. B.2-1c)

The financial facilities that make up the loans and guarantees: the territories with a public strategy in the mediation lines facilitate the funding of companies and their products via these bridge agreements between banks and credit agencies, which helps increase the cash flow in the sector.

The **tax incentives** are a great investment boost in a territory: on the one hand, they stimulate cross-sectional private investment in audio-visual projects in the territory itself, and that is why it is important that incentives can be accessed in a simple and easy manner, and that they have solid legal guarantees. On the other hand, the tax incentives for foreign audio-visual productions attract filming and not only stimulate the audio-visual sector via contracting professionals and companies in the territory, but also other related sectors, such as tourism and hotel services.

The tax framework is extraordinarily competitive between the various European territories, and has diverse figures that you need to understand well, as well as the investment requirements in the territory that are usually associated with them.

In this section, we include the **obligations** imposed on different agents in the audio-visual sector (audio-visual communications service providers, distributors, exhibitors, advertisers or users, among others) which we consider appropriate to include together, although they may be financial and non-financial, as we understand that both help to create an offer-demand flow which contribute to equipping the sector with stability and maturity:

- **Financial**, understood to be fees and quotas that can be contributed directly to a specialised business fund, as in the case for the French CNC, to Ministries, Film institutes or other public agencies, or directly to the General Budgets for a territory, or as a pre-investment obligation in audio-visual projects; investing directly in the production, co-production or the purchase of rights.

It is also important to know whether the pre-investment obligation in European audio-visual projects has any additional requirements:

- If it has to be totally or partially destined for independent production projects: this obligation acts as a motor in the business sector in a territory and guarantees cultural diversity.
 - If there are specific quotas for projects in co-official and minority languages; stimulating local production and guaranteeing linguistic diversity.
 - Other possible and relevant obligatory investment quotas that will affect the entire sector, if any, are:
 - Specific quotas for animation projects
 - Quotas for cinematographic and non-cinematographic platforms
 - Quotas for single or serialised projects
 - Quotas for adolescent or children’s content
- **Non-financial**, which could be those related to the promotion or the percentage reserved for the broadcasting, exhibition or content in programme catalogues (and their prominence) of projects produced in a certain territory, in official, co-official and minority languages, or those destined for an adolescent or children’s audiences.

FIG. B.2-1c PUBLIC TOOLS FOR PROMOTING AV (Audio-visual) PROJECTS

Indirect funding	Financial facilities	Loan
		Guarantee
	Tax incentives	Tax rebate
		Tax credit (transferable)
		Tax credit (non-transferable)
		Tax shelter

FIG. B.2-1c PUBLIC TOOLS FOR PROMOTING AV (Audio-visual) PROJECTS (cont.)

Indirect funding	Obligations	Financial	As per the obligated subjects	AV communications service providers	Public	
					Private	
					Linear	
					Non-linear	
					Headquartered in the territory	
					Audience in the territory	
			Other obligated subjects			
			As per the type of obligation	Fee	Specific fund	
					Other	
				Direct investment	Production	
					Co-production	
			Purchase of rights			
		Other				
		As per the purpose of the funding	Type of project	By independent producers		
Other						
As per the first exhibition platform	Cinematographic					
	Non-cinematographic		Single			
			Serialised			
As per the content	For children					
	Not for children					
Non-financial	As per the obligated subjects	AV communications service providers	Public			
			Private			
			Linear			
			Non-linear			
			Headquartered in the territory			
			Audience in the territory			
	Other obligated subjects					
	As per the type of obligation	Broadcast/exhibition/catalogue %				
		Promotion				
		Other				
Other						

Private funding of the audio-visual industry

The main variables of the private funding of the audio-visual industry in a territory are strongly determined by the tax framework, especially in investments related with tax discounts.

Once the regulatory framework and the main characteristics of the investor (legal nature and purpose, territorial scope) have been identified, we must understand which investment tool has been used, and which were the subject and purpose of investment.

FIG. B.2-2 PRIVATE FUNDING		
Regulatory framework		
Amount invested		
Financial entity	Legal nature	Individual
		Legal entity
	Purpose	Non-profit
		For-profit
Territorial scope	Supra-national	
	National	
	Territorial	
	Other	
Number of investors	One	
	Various	

FIG. B.2-2 PRIVATE FUNDING (cont.)

Type of investment	Financial facilities	Credit
		Guarantee
	Direct investment (funding contracts)	
	Joint venture formulas (EIG, EEIG, UTE [<i>Uniones Temporales de Empresas</i> (Temporary Joint Ventures)])	
	Crowdfunding	
	Crowdlending (Peer-to-Business leading)	
	Venture Capital	
	Business Angels	
	Private equity	
	Sponsoring	
	In-kind donations	
	Other	
Subject of the funding	Individual	
	Legal entity	
Purpose of the funding	Structure	Foundation
		Growth
		Transformation
		Consolidation
		Other
	Activity	RDI
		Creation
		Production
		Distribution
		Promotion
		International expansion
		Exhibition
		Digitalisation
	Other	
	Product	Feature films and cinematographic films
		Series
		Other

B.3. Conservation

The future

Key figures: Public and private initiatives and institutions

Actions: Conservation of audio-visual assets

Resources: Audio-visual archives and databases on preserved materials

Main values: Digitalisation, archiving, conservation and restoration

Possible results: Digital database on European audio-visual animation projects

Definition

The acknowledgement that audio-visual projects form part of the cultural heritage of a territory is a relatively recent idea that has barely been taken in by the administrations, which nowadays, —more than twenty years after the publication of the European Convention for the Protection of the Audio-visual Heritage, which was only ratified by eleven of the 47 countries forming part of the European Commission— must also incorporate new concepts such as multimedia or interactive projects.

The conservation of audio-visual animation projects is an urgent obligation, since they are fragile from a material point of view —particularly those that came before the digital era—, and they have been undervalued from an artistic and intellectual point of view, despite being a cultural reference point for many generations and the fact they help to construct the idea of world during childhood.

In this stage, it is important to not only discuss conservation, but also accessibility, therefore, the digitalisation initiatives of the preserved materials, which enable them to be accessed by researchers, scholars, experts and the general public, must be taken into account.

In this line, concerning the access by the public, both the public and private proposals must be considered, which disseminate the preserved Heritage, via publications, exhibitions, showcases, or similar.

Objectives

In this stage, we will attempt to identify good conservation practices with the aim of presenting success stories to those in charge of public cultural policies in the different territories.

We aim to:

- List both the public and private initiatives involved in the preservation of audio-visual animation Heritage.
- Classify the public grants for preservation, focusing mainly on the animation sector.
- Identify the museums, film archives, foundations and other bodies focusing on the preservation of the animation Heritage.
- Identify initiatives to offer the public access to audio-visual animation heritage (publications, exhibitions and similar).

We want to know:

- Public conservation strategies for audio-visual animation projects.
- Support tools for funding the conservation of audio-visual animation projects.
- Institutions and bodies dedicated to the preservation of audio-visual animation projects.
- Plans for accessibility and dissemination of the preserved materials.

Approach

- Collaboration with the Ministries of Culture and other competent departments in the heritage preservation in order to identify the strategies, plans, and the public support measures for the conservation of the audio-visual animation heritage.
- Cooperation with film institutes, museums and publishers, foundations, Film Archives and Libraries and archive funds for public radio and televisions in order to understand and analyse the conservation and dissemination initiatives for audio-visual animation heritage that have been carried out or which are expected to be implemented.

- Surveys to be completed by:
 - The entities, institutions and bodies that finance the conservation and dissemination of the heritage.
 - The entities, institutions and bodies that conserve the heritage.
 - The entities, institutions and bodies that disseminate the heritage.

Main variables and indicators

We will divide the study variables into two sections. The first will reflect the characteristics of the **entities, institutions and bodies dedicated to the conservation of the heritage**, from a perspective of its own nature (public or private, for-profit or not-for-profit, whether it is within a conservation programme or independent programme), the manner in which it is funded, the date activities began, its accessibility and the dissemination activities it is a part of, in order to continue with the specific characteristics of the preserved heritage. (FIG. B.3-1)

FIG. B.3-1.- CONSERVATION: BODIES		
Name		
Location	Country	
	City	
Legal nature	Public	
	Private	For-profit
		Not-for-profit
Type of funding	Private funds	
	Public funds	Direct concession
		Competitive basis
	Other	
Conservation programme	Yes	
	No	
Start date of the conservation activities		

FIG. B.3-1.- CONSERVATION: BODIES (cont.)

Dissemination initiatives	NO			
	YES	Publications		
		Exhibitions, showcases or similar		
Other				
Accessibility	Open to the public	NO		
		Specialised		
		General		
	Cost	Free		
		Paid		
Listings	YES			
	NO			
Total number of preserved animation projects				
Territorial scope of the preserved projects	Supra-national			
	National			
	Territorial			
	Other			
Classification of the preserved projects	Support	Film		
		Digital		
		Other		
	Premiere	Cinematographic		
		Non-cinematographic		
	Format	Single	Feature film	
			Short film	
			Other	
	Serialised			
Technique	Animation			
	Animation and real image			

In the second block, we will address the **funds** for the conservation of the existing audio-visual assets in a territory. Firstly, by identifying the granting institutions. the fund itself and the type of funding that can be obtained through it, whether direct or via a grants' programme, in which case the main characteristics of this grant would need to be studied.

It would be studied from its own characteristics (availability, provision, annual invitations to tender, whether it is repayable or not), but also the characteristics of the subjects applying for it and the purpose of the funding itself. (FIG. B.3-2)

FIG. B.3-2.- CONSERVATION: FUNDS

Name of the granting institution		
Location	Country	
	City	
Territorial scope	Supra-national	
	National	
	Territorial	
	Other	
Legal nature	Public	
	Private	For-profit
		Not-for-profit
Name of the fund		
Budget programme		

FIG. B.3-2.- CONSERVATION: FUNDS (cont.)

Type of funding	Direct funding			
	Type of funding	Grants' programme	Name of the financial support	
Annual invitations to tender			YES	Fixed
				Variable
			NO	
Provision				Total
				Maximum per application
Type of grant				Subsidy
				Refundable contribution
Competitive basis				Yes
				No
Applicants				Individual
				Legal entity
Purpose of the funding				Recuperation
	Classification			
	Digitalisation			
	Conservation			
	Restoration			
	Dissemination			
	Other			

ANNEX

The **spaces for dialogue** between the agents of the animation sector value chain

C.1. Networking

Events

Key figures: Public or private organising entities that create meeting spaces among the agents of the sector

Actions: Events and platforms for exchange within the sector

Resources: Proposals and accessibility

Main values: Construction and consolidation of networks

Possible results: Cross-sector congress that involves the entire value chain for the animation sector in Europe

Definition

The pandemic has changed, among many other things and at best, the way we connect with each other. The sector's calendar, marked by various networking events, has suffered a sudden change which, however, does not seem to have slowed the pace of the industry. Exchanges have been held online, a more complicated formula for those agents in the value chain who do not yet have a consolidated agenda: it has been proven that the work may not need to be in-person; however, online interaction does indeed affect the building of trust and the development of future strategies.

Bearing in mind that networking is one of the main assets for professionals or companies, we thought it was appropriate to dedicate this last section to a generally undervalued, but fundamental activity. In this stage we will study the events dedicated to animation, from a **quantitative** and **qualitative** perspective: European animation needs professional markets and forums, but also, displays that bring it closer to the public (and many of them) and which give it recognition within the audio-visual sector itself.

Objectives

- To identify spaces for the promotion and recognition of European animation.
- To quantify the impact that participation in an event has on the professionals and the audio-visual animation projects.
- To measure the impact that these events have on a territory.
- To design promotion and internationalisation strategies for the European animation industry.

We want to know:

- The role that each one of the events related with animation plays in a particular territory.
- If they achieved the objectives that were set out.
- If they are accessible.
- What they bring to a territory.
- What their areas of improvement are.
- Which lines of innovation are being considered following the health crisis.

Approach

- Surveys to be completed by professionals in the animation sector in different areas, in order to understand which events are better suited to the needs of the sector.
- Collaboration with the local and national administrations in charge of the events related to animation in a particular territory.
- Collaboration with private entities (associations, companies, foundations) organising the events related to animation in a particular territory.

Main variables and indicators

Once the **organising entities** and the **funding model** for the event have been identified, we will study its **classification**, since each proposal offers a response to the various needs of the sector.

Analysis from the perspective of the **attendees**, participants o public (if applicable), and the content being focused on will also be important.

We also recommend that the **entrance cost** for events in a particular territory be evaluated, as it could be a fundamental issue in order to assess their accessibility or usefulness for the audience at which it is aimed. *(Fig. C.1-1)*

FIG. C.1-1 EVENTS		
Organising entity	Public	
	Private	
	Other	
Funding	Public	
	Private	
	Other	
Held	In-person	
	Online	
	Hybrid	
	Other	
Type of event	Congress	
	Convention	
	Meeting	
	Trade show	
	Festival	
	Forum	Pitching
		Co-production
		Funding
		Networking
		Other
	Market	
	Showcase	
	Awards	
	Screenings	
Upfronts		
Other		

FIG. C.1-1 EVENTS (cont.)

Scope	Local			
	National			
	European			
	International			
	Other			
Attendees	Participants	Classification	Specialised	Institutions
				Companies
				Professionals
				Students
				Other
		General		
	Entrance	Unrestricted	Free	
			Paid	Registration
				Accreditation
		Other		
		Restricted		
	Public	Classification	Specialised	Institutions
				Companies
Professionals				
Students				
Other				
General				
Entrance	Unrestricted	Free		
		Paid	Ticket	
			Accreditation	
	Other			
	Restricted			
Other				

FIG. C.1-1 EVENTS (cont.)

Content	Category	Animation	
		Animation and real image	
		Animation and VX	
		Animation and Video games	
		Other	
	Format	Single	Feature films
			Short films
		Serialised	
		Other	
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Patxi Azpillaga/Petxo Idoyaga

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